MAYO CLINIC LABORATORIES

Notifications

Quick Reference Guide

Access Notifications

*Via **My Dashboard***

1. Log in to MayoClinicLabs.com.
2. Navigate to **My Dashboard** and click **Notifications**.

   Note: For access, contact Customer Service.

3. If you have access to more than one account, select the desired one(s) from the **Account Number** drop-down menu.

Via MayoACCESS

In **Resources** section of extended frameset, click **Notifications**.

Find more information

On any page, click the **Help** icon for additional resources.

Find a Notification Rule

On the **NOTIFICATION RULES** page, in the **Global Filter** text field, enter a **Rule ID**, keyword, phrase, rule author's name, or string of characters from any Value that is set for that rule.

To sort the **Notification Rules List** by any column except **Actions** in ascending/descending order, click the bold column header, or click to its right and then click the blue arrow. Click again to toggle.

Create a Notification Rule

1. On the **NOTIFICATIONS RULES** page, click **CREATE**.
2. On the **NOTIFICATIONS RULE DETAILS** page, if you have access to more than one account, select one from the **Account Number** drop-down menu.
3. Enter a unique, meaningful **Name** for the rule.
4. Under **Get Notified**, from the **When** drop-down menu, select either **Results are available** (default) or **Order is transmitted**.
5. Select the desired **Data Field** value.
6. If **Condition to Match** and (optional) **Values** appear, where possible, either select options from the associated drop-down menus or manually enter text into those fields.
7. To send notifications when any of multiple **Values** specifications are met, for each, click **+ OR** and enter the corresponding **Values** term into the new field.
8. Click **ADD CONDITION** to add more Conditions and specify their values until the rule is complete.

   Note: A notification is sent if:

   - Any **+ OR** Value is met.
   - All Conditions are met.

9. In the **Email Recipients** text field, enter each email address to be sent notifications and click **ADD** for each.

   Note: The notification will be sent to any valid email address, including for a distribution list.

10. Click **CREATE**.

Edit a Notification Rule

1. In the Rules List, under **Actions**, click **DETAILS** for that rule.
2. On the **RULE DETAILS** page, edit the rule's **Name**, **Active** status, **Conditions**, and/or **Email Recipients** as needed.

   Note: The **When** drop-down menu selection cannot be changed.

3. To change the rule's status, move the slider from inactive to **Active** or vice versa.
4. Click **UPDATE**.

Clone a Notification Rule

Note: Use this function to create a template for a new rule based on an existing one, not to edit an existing rule.

1. In the Rules List, under **Actions**, do one of the following:
   - Click **DETAILS** for the original rule. Then, at the top of the **RULE DETAILS** page for that rule, click **CLONE**.
   - Click **CLONE** for the original rule.
2. On the **RULE DETAILS** page for the cloned rule, enter a **Name**.
3. Edit cloned rule's **Conditions** and/or **Email Recipients** as needed.
4. Click **CREATE**.

Manage Rules with obsolete Mayo Test IDs

It is recommended that you clone **NOTIFICATION RULES** with obsolete Test IDs. To do so:

1. Click the link in the email notification. Alternatively, on the **RULE DETAILS** page for the original rule, in the pink banner message above the **Conditions** section, click the **CLONE** link.
2. On the **RULE DETAILS** page for cloned rule, enter a unique **Name**.
3. Under **Conditions**, in **Values**, enter the replacement Test ID.
4. Click **UPDATE**.

To inactivate a rule with an obsolete Test ID, on its **RULE DETAILS** page, click **INACTIVATE**. To reactivate it, click **ACTIVATE**.

Testing a Notification Rule

In the Rules List, under **Actions**, click **TEST** for that rule.

The **TEST NOTIFICATION RULE** page appears. When it initially loads, it shows orders from the last 90 days for the selected account matching the rule's Conditions.

- To test whether the rule sent notifications for orders within a certain date range, under **Order Date**, select a timeframe: **LAST WEEK**, **LAST 30 DAYS**, **LAST 90 DAYS** (default), or a custom date range. Then click **SEARCH**.
- To test whether a rule sent notifications for a specific order, enter the **Patient Name**, **Medical Record Number**, **Date Of Birth**, **Order Number**, **Test** name or ID, and/or **Physician Name**. Then click **SEARCH**.

Below, the Orders List shows all orders that match both your search parameters and rule Conditions.

Only Display Matching Orders is toggled on by default. When it is toggled off, the Orders List shows all orders matching your search criteria, distinguishing those that match the rule's Conditions from those that do not as follows:

- A green check mark under **Matches** means the order met all Conditions of the rule and a notification was sent. No check mark means no notification was sent.
- **Matching Conditions** displays rule Conditions that were met for that order in **green** text. **Not Matching Conditions** displays rule Conditions that were not met for that order in **red** text.

To customize the list:

- Use the **Hide/Show Columns** check boxes to select which columns to view (except **Matches**).
- To sort orders by any column, click its header.
- Change column order by hovering over the header of the column you want to move, then dragging and dropping it where desired.

To view the report (if available), click PDF icon in **Report** column.

Viewing Notification Rule History

1. In the Rules List, under **Actions**, click **HISTORY**.

   The **RULE HISTORY** page displays all versions of the rule in descending order, starting with the current one.

2. To see any orders in the last 90 days for which that version sent notifications, click **VIEW DETAILS** for that version. You will also see that version's **Conditions**, **Email Recipients**, and other **Details**.

3. Select a timeframe: **LAST WEEK**, **LAST 30 DAYS**, **LAST 90 DAYS** (default), or a custom date range.

Accessing results from an email notification

After receiving the notification, click the order number link.

- If it is a **Test Results Available** email message, the PDF of the results report appears in a new browser tab.
- If it is an **Order Transmitted** email message, the order details appear in a new browser tab.

Note: To view the results report from the email notification, you must be (a) able to log in to MayoClinicLabs.com and (b) authorized to view results for the account.

Exporting data

Click the **EXPORT TO CSV** button in one of the following places:

- At top right of the **NOTIFICATION RULES** page to download all rules for the account.
- At top right of any **TEST NOTIFICATION RULE** page to download all orders matching any filter or search parameters you have set.

  Note: You cannot export more than 4,000 orders to a CSV file.

A CSV file of the relevant data will be downloaded to your device.